



STEP BY STEP

FINANCIAL ADVISORY

The most arduous of journeys begin with a small step

Date:

To
The Customer Care
AMC/Registrar:

Request for Folio Consolidation

I/We wish to consolidate all my/our below mentioned folio numbers into one folio number.

Please find below my/our existing folio numbers in the blocks:

Source Folio Numbers

Target Folio Number

(First Holder)

(Second Holder)

(Third Holder)

Instructions:

- **Consolidation of folios can made only, if the investment details i.e.Name of the holders, Pan Proof, Bank Mandate, Address, Mode of Holding and Nominee should be in the same order.**
- **The Consolidation can be made by individuals applying for/holding units on their own behalf singly/jointly,Non-Individuals including Society,Tryst,HUF,Body Corporate,Partnership Firm,Karta,Holder of POA**
- **If the units are held jointly, all joint holders have to sign the consolidation form.**

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